



SANDATA ELECTRONIC VISIT VERIFICATION (EVV): CLIENT DATA ENTRY

OBJECTIVES



After completing this lesson, you will be able to:

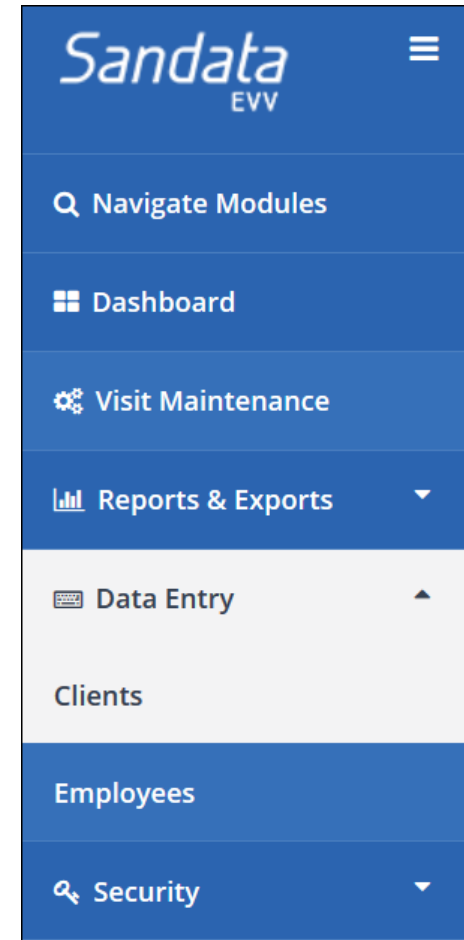
- ◆ Search for a client
- ◆ Add a client's record
- ◆ Update a client's record
- ◆ Delete/close a client's record

KEY TERMINOLOGY

Term/Acronym	Definition
Client	A person who receives services through the Medicaid program
Employee	A person who is employed by an agency provider to provide care to one or more clients

ACCESSING DATA ENTRY

- ◆ The Data Entry module allows system users to maintain client and employee records.
- ◆ A system user with the appropriate permissions will see the Data Entry link listed in the Navigation panel on the left side of the screen.
- ◆ Clicking on the link will expand the section to show Client and Employee options.

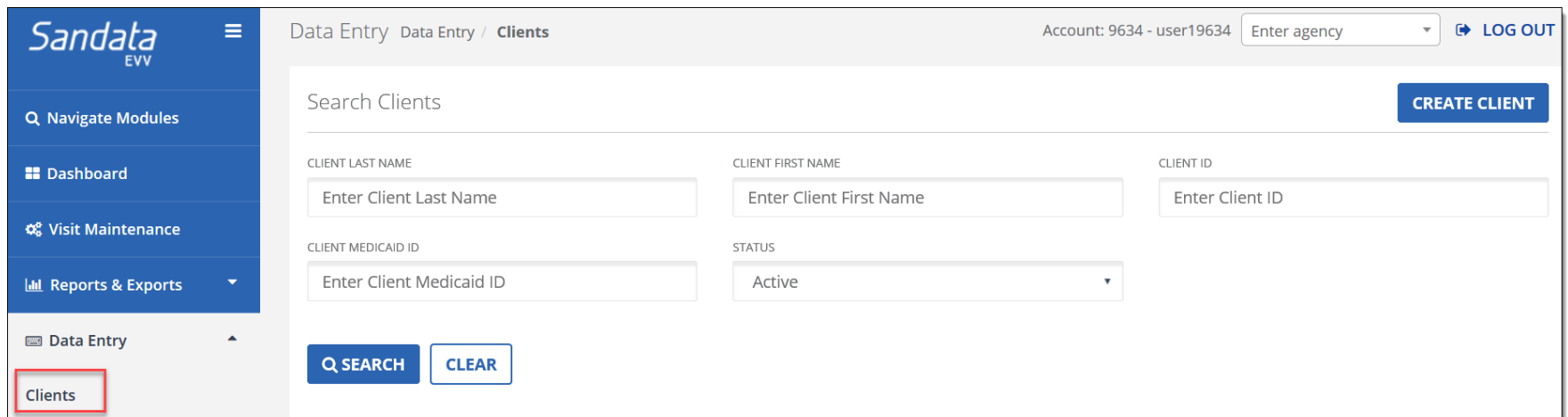




SEARCH FOR A CLIENT

SEARCH FOR A CLIENT

1. Click **Data Entry > Clients** from the Navigation panel. The *Data Entry / Clients* search screen displays.



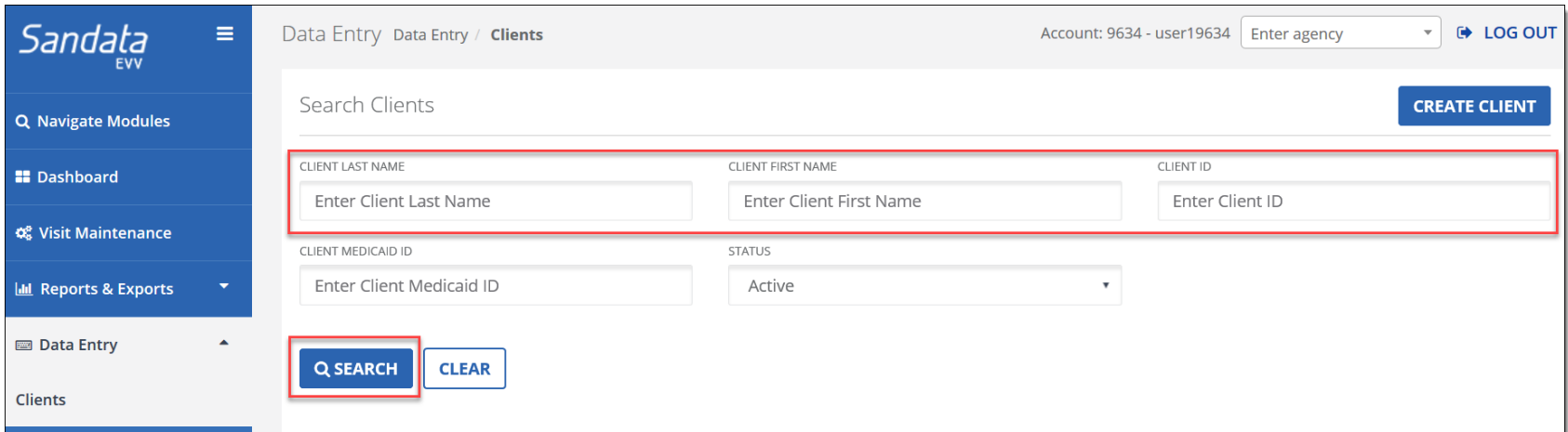
The screenshot shows the Sandata EVV Data Entry / Clients search screen. The left navigation panel includes links for Navigate Modules, Dashboard, Visit Maintenance, Reports & Exports, and Data Entry. The 'Clients' link under Data Entry is highlighted with a red box. The main content area has a header with 'Data Entry / Clients', account information, and a 'LOG OUT' link. Below the header is a 'Search Clients' section with a 'CREATE CLIENT' button. The search form includes fields for Client Last Name, Client First Name, Client ID, Client Medicaid ID, and a Status dropdown menu. At the bottom of the form are 'SEARCH' and 'CLEAR' buttons.



The system prevents duplicate client entry based on the Client ID/Medicaid ID

SEARCH FOR A CLIENT

2. Enter values either in the **CLIENT ID**, **CLIENT FIRST NAME** or **CLIENT LAST NAME** field, or a combination of the three (3).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



The screenshot displays the Sandata EVV Data Entry interface. On the left is a blue sidebar with navigation links: 'Navigate Modules', 'Dashboard', 'Visit Maintenance', 'Reports & Exports', and 'Data Entry' (which is expanded to show 'Clients'). The main content area has a header with 'Data Entry / Clients', user information 'Account: 9634 - user19634', an 'Enter agency' dropdown, and a 'LOG OUT' link. Below the header is a 'Search Clients' section with a 'CREATE CLIENT' button. The search form contains five input fields: 'CLIENT LAST NAME' (placeholder: 'Enter Client Last Name'), 'CLIENT FIRST NAME' (placeholder: 'Enter Client First Name'), 'CLIENT ID' (placeholder: 'Enter Client ID'), 'CLIENT MEDICAID ID' (placeholder: 'Enter Client Medicaid ID'), and 'STATUS' (a dropdown menu currently showing 'Active'). At the bottom of the form are two buttons: 'Q SEARCH' and 'CLEAR'. A red rectangular box highlights the three top input fields (Last Name, First Name, and ID), and another red box highlights the 'Q SEARCH' button.



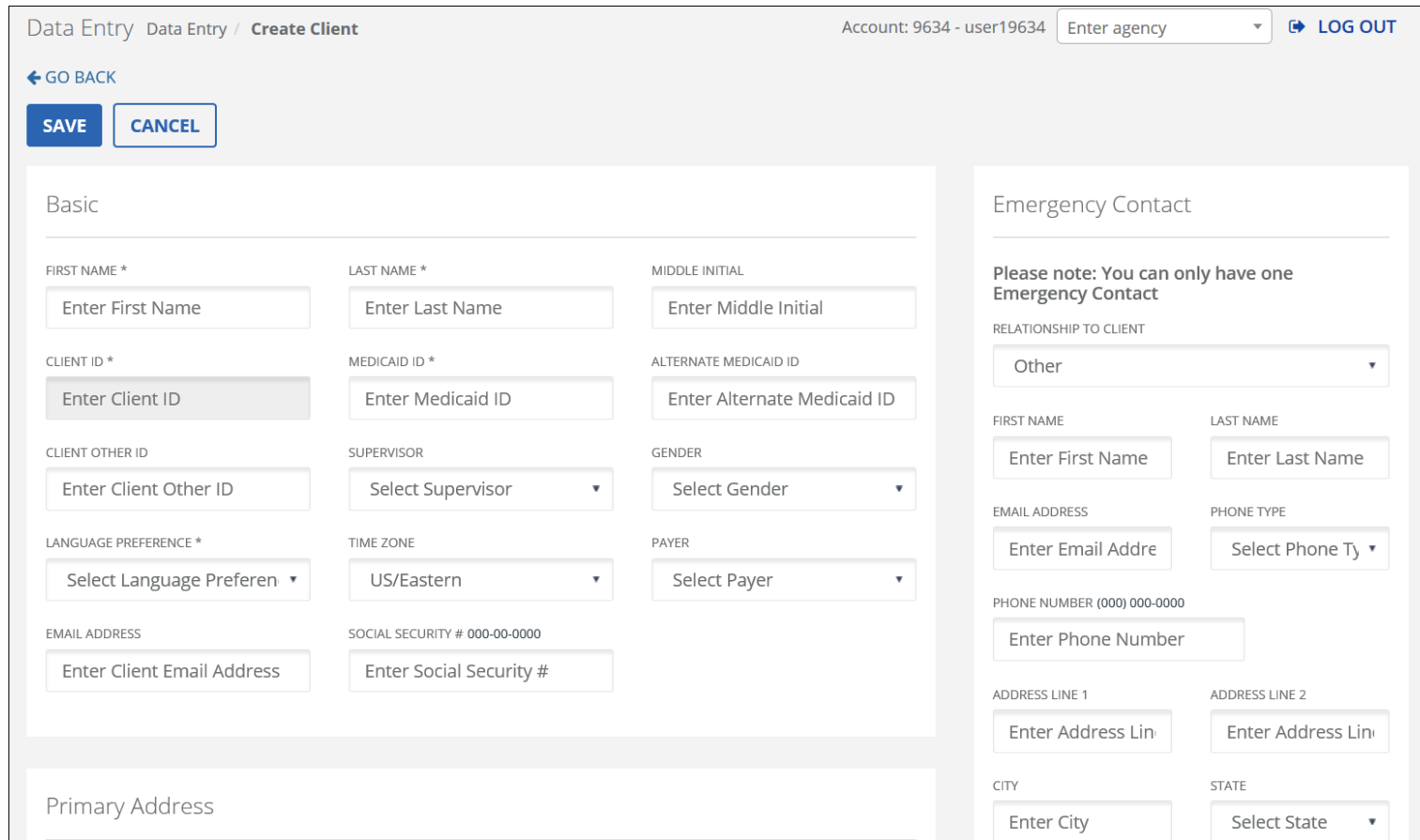
If multiple search values are entered, Sandata EVV attempts to match against all exact values entered. Searching with no criteria selected displays a complete list of all active clients.



CREATE NEW CLIENT(S)

CREATE NEW CLIENT(S)

1. Click **CREATE CLIENT**. The *Create Client* screen opens.



The screenshot shows the 'Create Client' form in the Sandata Data Entry system. The form is divided into two main sections: 'Basic' and 'Emergency Contact'. The 'Basic' section contains fields for personal and identification information, while the 'Emergency Contact' section is for contact details. At the top, there is a navigation bar with 'Data Entry / Create Client', user information, and a 'LOG OUT' link. Below the navigation bar are 'GO BACK', 'SAVE', and 'CANCEL' buttons.

Basic

FIRST NAME *
Enter First Name

LAST NAME *
Enter Last Name

MIDDLE INITIAL
Enter Middle Initial

CLIENT ID *
Enter Client ID

MEDICAID ID *
Enter Medicaid ID

ALTERNATE MEDICAID ID
Enter Alternate Medicaid ID

CLIENT OTHER ID
Enter Client Other ID

SUPERVISOR
Select Supervisor

GENDER
Select Gender

LANGUAGE PREFERENCE *
Select Language Preferen

TIME ZONE
US/Eastern

PAYER
Select Payer

EMAIL ADDRESS
Enter Client Email Address

SOCIAL SECURITY # 000-00-0000
Enter Social Security #

Emergency Contact

Please note: You can only have one Emergency Contact

RELATIONSHIP TO CLIENT
Other

FIRST NAME
Enter First Name

LAST NAME
Enter Last Name

EMAIL ADDRESS
Enter Email Address

PHONE TYPE
Select Phone Ty

PHONE NUMBER (000) 000-0000
Enter Phone Number

ADDRESS LINE 1
Enter Address Lin

ADDRESS LINE 2
Enter Address Lin

CITY
Enter City

STATE
Select State

CREATE NEW CLIENT(S)

2. Enter **FIRST NAME**, **LAST NAME**, **MEDICAID ID** and **LANGUAGE PREFERENCE** (Required).

Basic

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Middle Initial"/>
CLIENT ID *	MEDICAID ID *	ALTERNATE MEDICAID ID
<input type="text" value="Enter Client ID"/>	<input type="text" value="Enter Medicaid ID"/>	<input type="text" value="Enter Alternate Medicaid ID"/>
CLIENT OTHER ID	SUPERVISOR	GENDER
<input type="text" value="Enter Client Other ID"/>	<input type="text" value="Select Supervisor"/>	<input type="text" value="Select Gender"/>
LANGUAGE PREFERENCE *	TIME ZONE	PAYER
<input type="text" value="Select Language Preferen"/>	<input type="text" value="US/Eastern"/>	<input type="text" value="Select Payer"/>
EMAIL ADDRESS	SOCIAL SECURITY # 000-00-0000	
<input type="text" value="Enter Client Email Address"/>	<input type="text" value="Enter Social Security #"/>	

CREATE NEW CLIENT(S)

3. Enter client's Primary Address (Required).

Primary Address

ADDRESS TYPE *

Select Address Type ▼

ADDRESS LINE 1 *

Enter Address Line 1

ADDRESS LINE 2

Enter Address Line 2

CITY *

Enter City

STATE *

Select S ▼

ZIP CODE * 00000-0000

Enter Zip Code

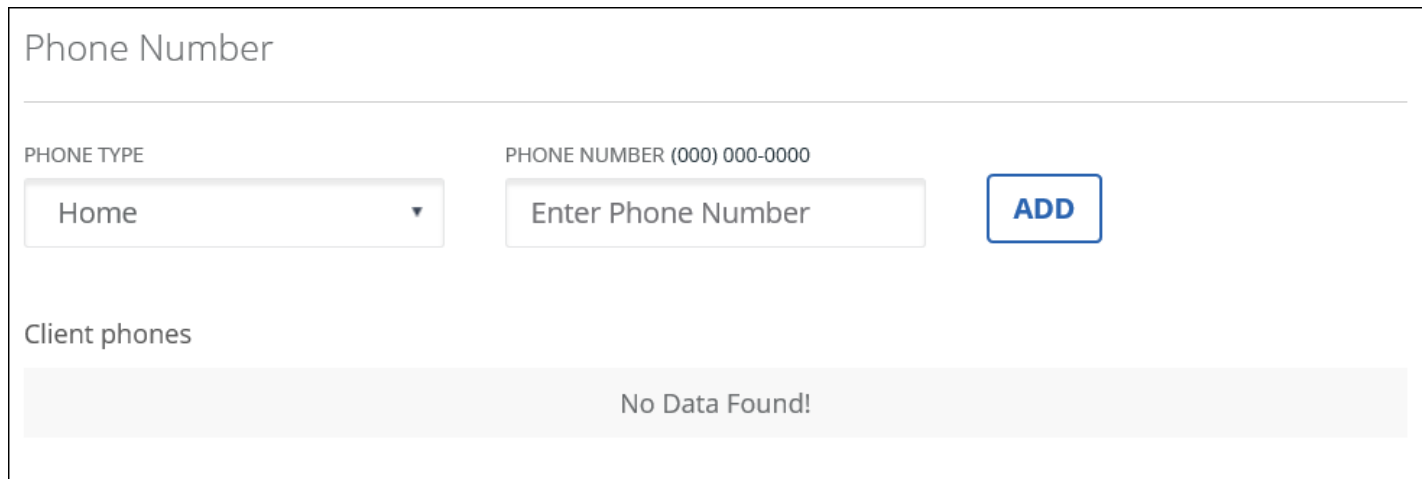
[View/Add Additional Address](#)



If a client has more than one address where he or she can receive care, click the View/Add Additional Addresses link to add the additional address(s) to the record. This allows the system to validate call-in and call-out times against the additional addresses to aid in minimizing visit exceptions.

CREATE NEW CLIENT(S)

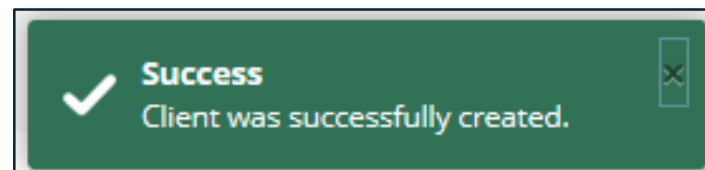
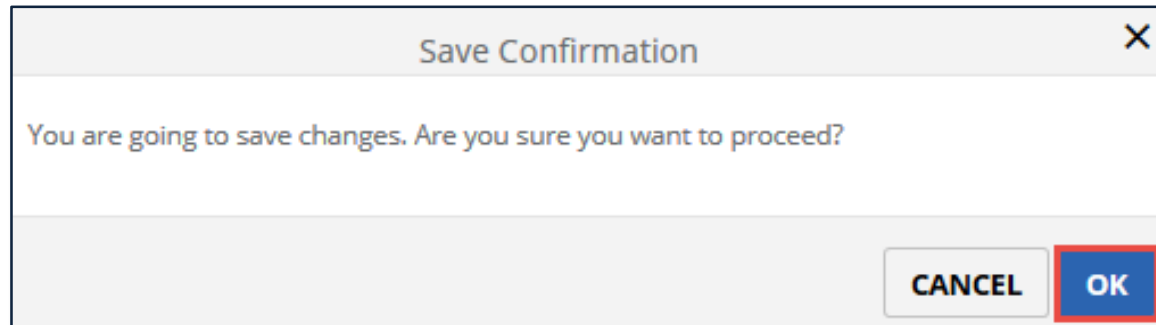
4. Select **PHONE TYPE**. Enter client's **PHONE NUMBER** (Optional).
5. Click **ADD**.

A screenshot of the Sandata EVV client data entry form. At the top is a 'Phone Number' input field. Below it are two sections: 'PHONE TYPE' with a dropdown menu currently showing 'Home', and 'PHONE NUMBER (000) 000-0000' with a text input field containing 'Enter Phone Number'. To the right of these is a blue 'ADD' button. Below the input fields is a section titled 'Client phones' which contains a light gray box with the text 'No Data Found!'.

If a phone type is selected, a phone number **must** be added.
If a client has more than one phone number from which the provider can call, the additional phone number(s) should be added to the client record. Sandata EVV validates call-in and call-out times against all phone numbers listed in the client record, minimizing visit exceptions.

CREATE NEW CLIENT(S)

6. Click **SAVE**. The Save Confirmation dialog box displays.
7. Click **OK**. The Client is added to the system.








MODIFY/DELETE/REACTIVATE CLIENTS

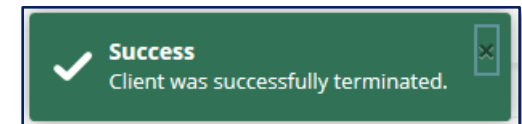
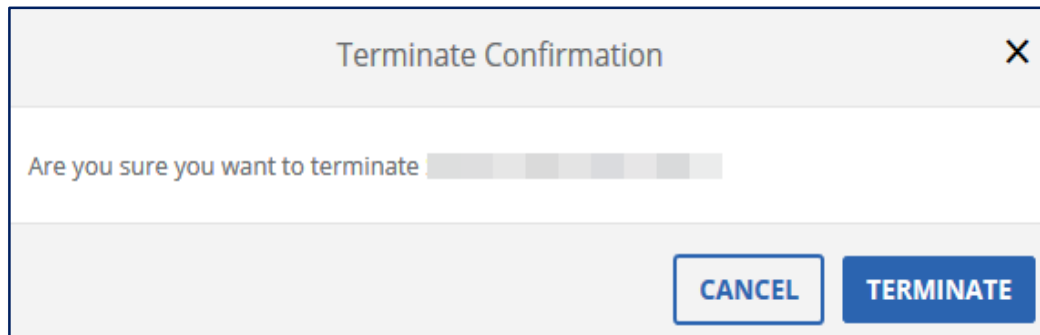
MODIFYING CLIENT DATA

- ◆ Modifying a client's data allows updates to the information, as necessary.
- ◆ Any updates made for the client is effective from the time the change is made. The information previously available continues to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
SMITH	JOHN	123456789	123456789	Active	 

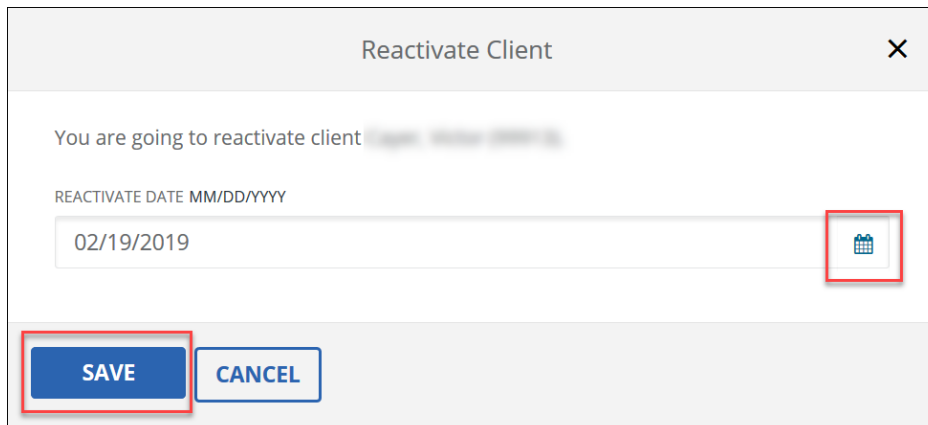
DELETING CLIENTS

1. Search for the client.
2. Click Terminate () to the right of the selected client's name. The Terminate Confirmation dialog box displays.
3. Click TERMINATE. A successful confirmation displays.



REACTIVATING CLIENTS

1. Search for a client with the status of Inactive.
2. Click Reactivate to the right of the selected client's name. The Reactivate Client confirmation dialog box displays.
3. Select a **REACTIVATE DATE**. The date defaults to the current day's date. A client can be reactivated up to the date they were originally deleted.
4. Click **SAVE**. A successful confirmation dialog box displays.

A screenshot of the 'Reactivate Client' dialog box. The title bar says 'Reactivate Client' with a close button. The main content area says 'You are going to reactivate client' followed by a blurred client name. Below that is a label 'REACTIVATE DATE MM/DD/YYYY' and a text input field containing '02/19/2019'. To the right of the date field is a calendar icon. At the bottom are two buttons: 'SAVE' and 'CANCEL'. Red boxes highlight the 'SAVE' button and the calendar icon.

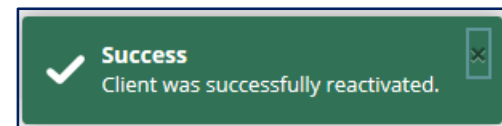
Reactivate Client

You are going to reactivate client [blurred name]

REACTIVATE DATE MM/DD/YYYY

02/19/2019

SAVE CANCEL



QUESTIONS...

